

Vietnam Electricity Comprehensive Report Q4/2019

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Abstracts

VIETNAM ELECTRICITY MARKET

The electricity market in Vietnam is still monopolistic when Vietnam Electricity (EVN) is the monopoly unit in the segments of electricity regulation, wholesale, transmission and distribution / retail. Power generation is the only segment that has the presence of entities outside EVN due to the fact that it requires huge investment capital. Over the past 10 years, Vietnam's power industry has been constantly adding supplies to keep up with the strong growth of demand. In the first 9 months of 2019, the total palace supply is estimated to increase x.xx% over the same period in 2018.

In the third quarter of 2019, the estimated electricity output accounted for x.xx% in the proportion of the total supply, an increase of xx.x% compared to the same period in 2018. The demand for electricity in Vietnam is huge, including in short, medium and long term. According to EVN's calculations, to meet the needs of economic development with a growth rate of xx% - x% and achieve the goal by 2020, Vietnam will basically become an industrialized country within 20 years. Electricity demand will have to increase from xx% - xx% per year.

The North-South 500kV ultra-high voltage grid system must constantly transmit high power from the North and the Central to the South, causing power losses. In Q4 / 2019, the electricity loss of the EVN Group was x.xx%, performing better x.xx% than the plan in 2019 (x.x%).

Electricity price in Vietnam is quite low compared to other countries in Asia - Pacific. However, compared to GDP per capita, electricity price in Vietnam is at high level. This is considered one of the reasons why the Government has to cross-subsidize. On March 20, 2019, the Ministry of Industry and Trade officially adjusted electricity price increase at x.xx%, equivalent to VND x, xxx.xx.

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